

CMS Migration Checklist

Everything to line up before, during, and after moving your website to a new platform, so nothing gets lost on the way over.

Phase 1: Pre-Migration Planning

- ☐ **Audit the current CMS.** Identify every content type: pages, posts, custom post types
- ☐ **Document custom functionality.** List all plugins, themes, and custom code
- ☐ **Map the content structure.** Plan how old content maps to the new platform
- ☐ **Write the SEO preservation plan.** Document every URL, metadata, and canonical tag
- ☐ **Take a full backup.** Export the database, files, media, and configuration
- ☐ **List every integration.** CRM, email, analytics, payment processors, APIs
- ☐ **Review user roles.** Document permissions, accounts, and access levels
- ☐ **Measure current performance.** Run a Lighthouse audit and record Core Web Vitals
- ☐ **Set migration goals.** Define success metrics, the timeline, and the budget

Phase 2: Content Inventory and Audit

- ☐ **Count all pages.** Landing pages, service pages, about pages, contact
- ☐ **Count all blog posts.** Include categories, tags, authors, and dates
- ☐ **Inventory media files.** Images, videos, PDFs, and other downloads
- ☐ **Document forms.** Contact forms, lead capture, calculators, surveys
- ☐ **List embedded content.** YouTube videos, Google Maps, social feeds
- ☐ **Review archived content.** Decide what to migrate and what to retire
- ☐ **List the redirects you'll need.** Every old URL that changes needs a 301
- ☐ **Check for broken links.** Find and plan fixes for internal and external links

Phase 3: Technical Preparation

- ☐ **Choose the target platform.** Sanity, Contentful, Strapi, WordPress, or a custom build
- ☐ **Select hosting.** Netlify, Vercel, AWS, or traditional hosting
- ☐ **Plan the URL structure.** Keep the same URLs or design a new structure
- ☐ **Set up the development environment.** Local development, a Git repository, version control
- ☐ **Configure a staging site.** A testing environment separate from production
- ☐ **Test the migration script.** Run it on a sample of content first
- ☐ **Plan the DNS strategy.** Minimize downtime during cutover
- ☐ **Set up monitoring.** Error tracking, analytics, uptime monitoring

- ☐ **Prepare a rollback plan.** Know how you'll revert if something goes wrong

Phase 4: Content Migration

- ☐ **Migrate in phases.** Start with the highest-priority content
- ☐ **Transfer all media.** Images, videos, and PDFs with correct file paths
- ☐ **Migrate metadata.** SEO titles, descriptions, Open Graph tags
- ☐ **Port custom functionality.** Recreate plugins and features on the new platform
- ☐ **Migrate forms.** Rebuild and test every data collection form
- ☐ **Set up redirects.** Put the 301s in place for every changed URL
- ☐ **Update internal links.** Point every link at the new URLs
- ☐ **Configure integrations.** Reconnect CRM, email, analytics, and payments
- ☐ **Import user accounts.** Migrate users with the right permissions

Phase 5: Testing and QA

- ☐ **Test on staging.** Full QA before going live
- ☐ **Check every page.** Content displays correctly
- ☐ **Test every form.** Submit test data and check the notifications
- ☐ **Verify media files.** Every image, video, and PDF loads
- ☐ **Test integrations.** CRM sync, analytics tracking, payment processing
- ☐ **Check mobile and browsers.** Phones, tablets, and each major browser
- ☐ **Run speed tests.** Lighthouse, PageSpeed Insights, Core Web Vitals
- ☐ **Test every redirect.** The 301s land where they should
- ☐ **Check SEO elements.** Meta tags, structured data, sitemaps
- ☐ **Run a security audit.** SSL, headers, vulnerability scan
- ☐ **Run an accessibility test.** WCAG conformance and screen reader checks

Phase 6: Launch

- ☐ **Take a final backup.** Keep a complete copy of the old site
- ☐ **Announce the window.** Tell users about any planned downtime
- ☐ **Update DNS.** Point the domain at the new hosting
- ☐ **Monitor for errors.** Watch for 404s, broken links, and errors
- ☐ **Test the live site.** A full smoke test on production
- ☐ **Submit the new sitemap.** Google Search Console and Bing Webmaster Tools
- ☐ **Update CDN and cache.** Clear and reconfigure caching
- ☐ **Enable monitoring.** Uptime alerts and error tracking

Phase 7: Post-Launch

- ☐ **Monitor analytics.** Traffic, conversions, user behavior
- ☐ **Track search rankings.** Watch the SEO impact week by week
- ☐ **Fix reported issues.** Act on user feedback quickly
- ☐ **Optimize performance.** Fine-tune caching, images, and code
- ☐ **Document the changes.** Material for team training
- ☐ **Archive the old site.** Keep a backup for reference
- ☐ **Update documentation.** New CMS workflows and editing guides
- ☐ **Train content editors.** How to use the new CMS

Need help with your migration?

Upforge moves websites with zero downtime and rankings protected: 35+ websites moved so far, the largest at 5,000+ pages. Start at upforge.io/services/cms-migrations, or run a free automated audit of your current site at upforge.io/free-audit.

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